To: GVTA Board of Directors

From: Bob Paddon, Vice President, Corporate and Public Affairs
Sheila Hartmann, Manager, Marketing Research

Date: February 8, 2005

Subject: BCAA and GVTA Marketing Research

PURPOSE

This report provides a summary of the key findings of research jointly commissioned and managed by the British Columbia Automobile Association (BCAA) and the Greater Vancouver Transportation Authority (GVTA) during 2003 and 2004. The report also provides information on how the GVTA is responding to research findings.

BACKGROUND

The Greater Vancouver Transportation Authority and the British Columbia Automobile Association share common goals of optimizing transportation options for GVRD residents and increasing drivers' satisfaction with the transportation system.

During 2003 and 2004, the two organizations commissioned focus groups, followed by a quantitative research of 900 regular drivers in Greater Vancouver to measure the receptiveness of drivers to transportation alternatives to the single occupant vehicle (SOV).

The research findings of the interest in viable transportation options among private vehicle drivers study are listed below:

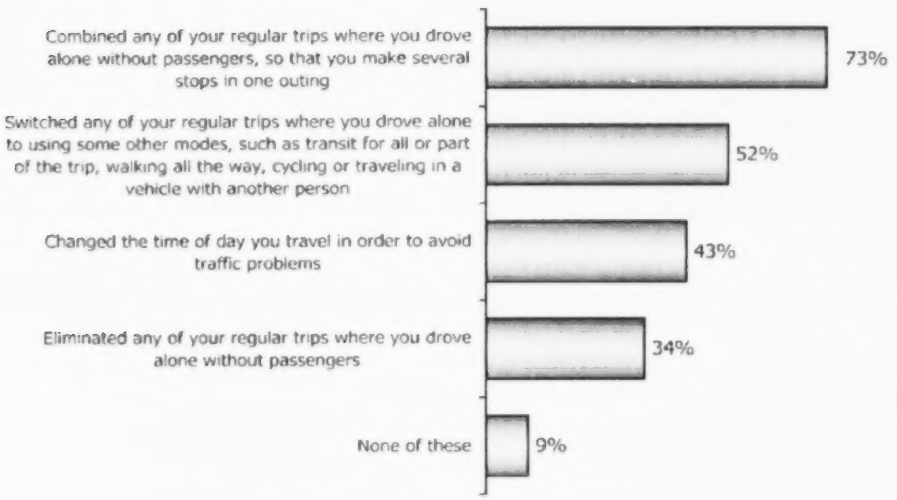
GVRD drivers want transportation options to the Single Occupant Vehicle, and recognize that the fewer SOV trips that are made, the less congestion they will have to deal with.

The research identified a great deal of readiness to try alternatives to the single occupant vehicle for one or two trips per week; in fact, most drivers have already made some small changes. The study was done to learn more about how people respond to choices. For the majority of people in the region, the private automobile is an integral part of their lives. When people aren't forced into change, they appear more willing to make changes.

In order to save time and money, a large majority of regular drivers have made some small changes to their SOV travel in the past year. Very high gas prices and increasing congestion have motivated some of the changes. Two in five drivers reported that they "do not find it easy to travel around the GVRD by private vehicle," and four in five drivers "expect that driving conditions in Greater Vancouver will get worse over the next five years." GVRD regular drivers express a great deal of dependence on the car, agreeing strongly that "If I didn't have a car, there are a lot of things I wouldn't be able to do," but at the same time agreeing strongly that "If there were fewer people driving alone in their cars, we would all save travel time."

"Thinking of your trips with Greater Vancouver where you drive alone in a vehicle, within the past year have you done any of the following..."

Past Year Changes in Auto Travel Patterns


Combined any of your regular trips where you drove alone without passengers, so that you make several stops in one outing
73%
Switched any of your regular trips where you drove alone to using some other modes, such as transit for all or part of the trip, walking all the way, cycling or traveling in a vehicle with another person
52%
Changed the time of day you travel in order to avoid traffic problems
43%
Eliminated any of your regular trips where you drove alone without passengers
34%
None of these
9%

Base: Total regular drivers (n=900)

- ***Trip Combining*** is the No. 1 change people have made to their single occupant vehicle (SOV) travel in the past year, with 73% of drivers having combined some regular SOV trips, making several stops in one outing.

- ***Trip Switching*** is the second most common change GVRD regular drivers have made to SOV travel in the past year with 52% of drivers having switched some regular SOV trips to some other modes, such as transit for all or part of the trip, walking all the way, cycling or travelling in a vehicle with another person.

- ***Changing the Time of SOV Travel to Avoid Traffic Problems*** is the third most common change, reported by 43% of GVRD regular drivers in the past year.

- ***Eliminating some SOV Trips*** is the fourth most common change, made by 34% of drivers.

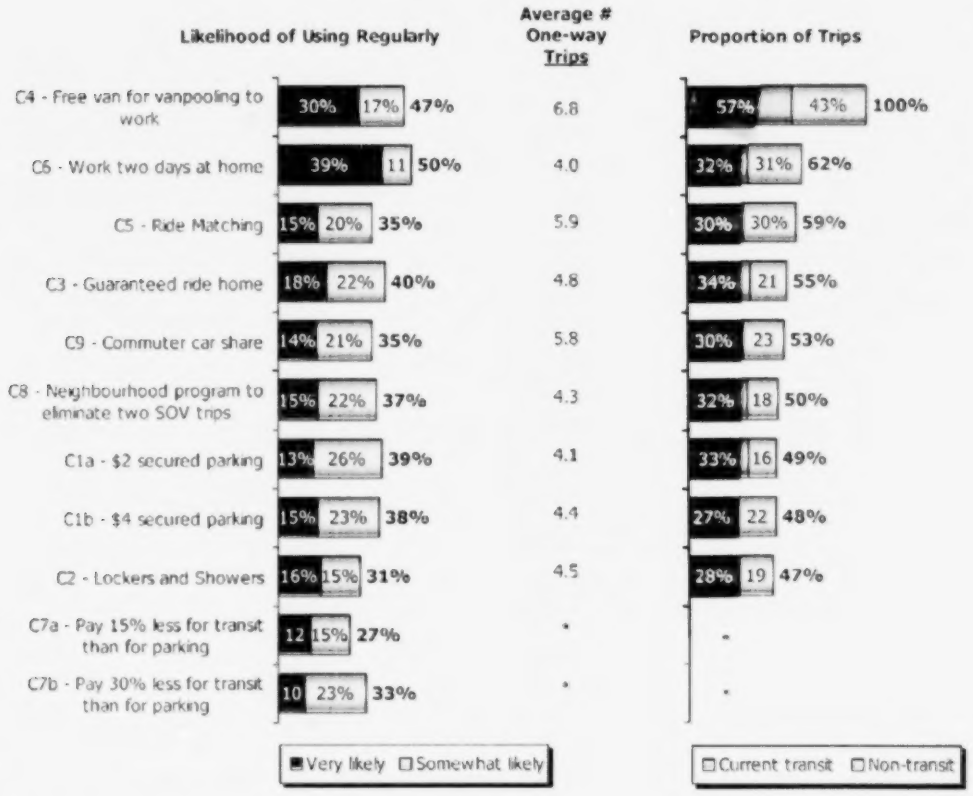
Although saving time and money were the main reasons for making these changes, the desire for greater fitness motivated some drivers to switch one or two SOV trips, and growing concern about the environment motivated some to eliminate trips. In the research, drivers were presented with the possibility of combining, eliminating or switching one or two SOV trips per week in the future. Consistent with what they already doing, combining trips would be easiest to do in the future; switching one or two SOV trips to an alternative move would be second easiest (27%), and eliminating one or two SOV trips would be the third easiest (18%).

The transit modes to which drivers would be most likely to consider switching one or two SOV trips are "a rail service like SkyTrain" (60%) and "small shuttle buses circulating in your neighbourhood and linking up to regional transit and major activity centres" (58%). In order to consider using transit more, drivers say service would have to be more frequent and reliable and cost less than driving and paying for parking. Transit stops would have to be closer and there would have to be more, express service and direct routes.

Drivers were asked to rate the value provided by TransLink for their transportation dollar. Three-quarters of drivers think that TransLink is providing good to fair value, while 6% of drivers rate the value as excellent. Most drivers were aware, when prompted, of the following recent TransLink initiatives: SkyTrain Millennium Line (92%), B-Lines (68%), several million dollars of road and bridge improvements (55%), Community Shuttles (43%), AirCare, HandyDART, car/vanpool (43%).

Nine travel choice options were tested in this study. While many of the tested initiatives are currently supported by TransLink, others are conceptual and require further study before implementation.

How likely would you be to use (CONCEPT) instead of driving alone in a vehicle at least once a month or more on a regular basis"



Base = Regular Drivers Who Commute to Work or School At least Once a Week by Single Occupant Vehicle

A "free van" provided by the employer to enable vanpooling with co-workers - with employees paying fuel and insurance costs, being picked up at home and using HOV lanes - offers the greatest potential of the alternative modes, as measured by trip volume.

The second largest potential for reducing SOV trips is working two days per week from home.

The third highest potential for SOV trip reduction is a local ride-matching service. Commuters would call a 1-800 number or register on-line to match with people in their neighbourhood or on their route who would be travelling to and from the same destination at the same time each day so that they could car/vanpool together.

The remaining initiatives all offered significant potential for reducing SOV travel:

- Guaranteed ride home for employees who take transit or car/vanpool to work
- Commuter car share program
- Neighbourhood programs to eliminate two SOV trips per week
- Multi-purpose pay parking structures with retail services adjacent to transit terminals for people who want to drive part of the way and take transit
- Lockers and showers at work or school for commuters who cycle, walk, job, blade, board, wheelchair
- A discounted transit pass (15% or 30% discount)

DISCUSSION

This study highlights a number of Transportation Demand Management (TDM) initiatives that could provide Greater Vancouver residents with viable alternatives to the single occupant vehicle (SOV). While many of the initiatives tested in this study are already part of TransLink's Commuting Options Program, the research concluded that a multi-pronged approach with strong leadership would be necessary to further encourage people to try transportation alternatives to the SOV.

Creating region-wide awareness and incentives for alternatives to the single occupant vehicle will require significantly more resources than TransLink currently has available for TDM programming. One way to address this resource issue is for TransLink to develop working TDM partnerships with GVRD municipalities, similar to BC Hydro's PowerSmart program. This process would see TransLink provide the TDM leadership, working with GVRD municipalities to implement area-specific TDM programs.

Some of this work is already underway. The Commuting Options program at TransLink has developed or is working on partnership links with the cities of Burnaby, New Westminster and Vancouver and their boards of trade. To date these relationships have proved fruitful – gaining TransLink the support and credibility needed to access corporate decision-makers on the issue of providing SOV alternatives to their employees.

A further exploration of formalized TDM partnerships between TransLink and GVRD municipalities could take place at the upcoming TransLink-sponsored TDM workshop on April 19, 2005. Details of that workshop will be provided in a separate report to the Board in March.

A brief summary of TransLink's Commuting Options initiatives are described below as part of the federal Urban Showcase initiative:

In 2005, TransLink will launch the Travel Smart individualized trip planning program in six neighbourhoods in Greater Vancouver. Households in each of the six neighbourhoods will be contacted to evaluate their openness to trying modes of transportation in addition to the single occupant vehicle for some of their travel, as well as to combining, switching or eliminating SOV trips. Before and after trip diaries will be completed for all members of the household, so that trip mode share can be measured and the impact of individualized marketing assessed in each of the neighbourhoods. Research suggests strong potential for trip combining and trip switching as a focus of Travel Smart, with an emphasis on the time and money benefits, and a secondary emphasis on the fitness and environmental benefits. Research also suggests good potential for a neighbourhood approach to Travel Smart as a pilot in at least one neighbourhood of the six, to duplicate the neighbourhood success of programs such as the Blue Box program, in which neighbours see neighbours making changes and this encourages further change.

The BCAA/GVTA study has identified the opportunity for continued support of the OnBoard program, in which TransLink meets with large employers, surveys their employees to establish present commuting patterns, and based on an analysis of the results, recommends commuting options to support changes to travel patterns, as well as providing a corporate employee pass at an annual discount of 15% off the price of a regular transit pass. The research confirms the attractiveness of vanpool programs such as the Jack Bell car/vanpool program and of Guaranteed Ride Home. It also highlights the continued importance of supporting TransLink funding of the ride-matching software program -"The Carpool Tool." This Internet-based ride-matching system will be rolled out by Jack Bell RideShare in March of this year (2005) and will provide Greater Vancouver residents the ability to match rides with people in their neighbourhood or on their commuting route.

Finally, the research would indicate that teleworking is a TDM initiative that is of interest to many people in the region. A next step may be to develop case studies of the contribution of teleworking to productivity could be provided to suitable large employers to encourage them to consider introducing teleworking to increase worker output and worker satisfaction, reduce absenteeism and attrition, and to save costs on office space. With labour shortages being forecasted in most sectors over the next decade, employers will want to evaluate every tool available to protect their investment in people. TransLink's Commuting Options program is currently exploring a relationship with an experienced teleworking service provider in Calgary.

CONCLUSIONS

This research initiative, undertaken with BCAA, points out the opportunities available and steps needed to reduce the number of SOV trips in the GVRD. To ensure that GVRD residents receive the broadest possible exposure to various trip reduction programs and the accompanying request to consider changing their transportation usage, it is important that TDM initiatives are supported on a regional scale. With TDM program implementation resources at a premium, the most effective means to develop and deliver incentive-based trip reduction programming to the residents of the GVRD is to through cross-agency and municipal partnerships.

There are a number of strong examples of this practice in BC. Two organizations that successfully deliver Demand Side Management programs, BC Hydro - Power Smart and ICBC - Road Sense, do so through a combination of their resources and those made available to them through a variety of partnerships. There are also many examples of other organizations that succeed only with the support of the partnerships they embrace – i.e., the United Way of the Lower Mainland. The common thread of success to all is a support system built from a group of like-minded organizations that believe in the benefits of the particular program they support.

The creation of a mechanism that that could effectively communicate the benefits and implement programs on a regional scale, but at a level more people may pay attention to, will ensure the greatest possible results from incentive-based TDM programming. Success with this approach could lead to reducing the need for increasing certain transportation infrastructure or the introduction of options for commuters and other demand management measures.

Moving forward in this region requires "room to move". A growing need to reduce congestion on the region's roads is key to providing that room. A communication of the research findings to agency and municipal partners is an important next step. To that end, a TDM Workshop (April 19, 2005 at the Wosk Centre for Dialogue) is planned to bring together political and administrative representatives from municipalities and agencies across Greater Vancouver to follow up on this theme. The one-day event is focused on the issue of TDM partnerships and how we can successfully move towards regional TDM partnerships.

A research project of this scope would not have been possible without the support of the BCAA. GVTA looks forward to future initiatives with BCAA that meet both organizations' objectives.